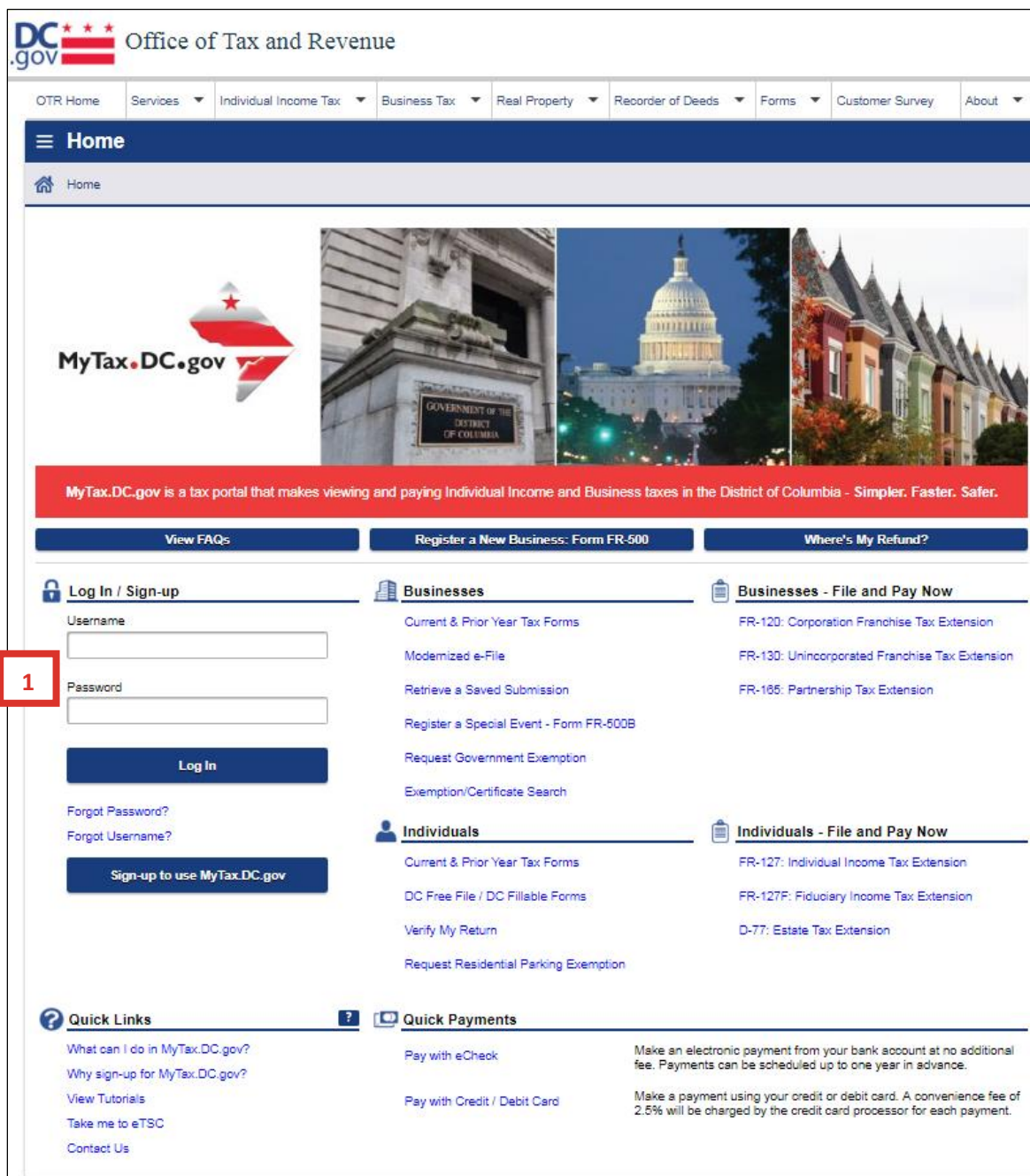


My Tax.DC.gov User Guide:

How to Request and Approve Third Party Access

You can request to manage another taxpayer's account with his or her permission. **Note:** Both parties must have a [MyTax.DC.gov](https://mytax.dc.gov) account (visit "[How to Sign up for an Account](#)" for more information.).

Request Third Party Access to a Taxpayer's Account



The screenshot shows the MyTax.DC.gov homepage. At the top, there is a navigation bar with links: OTR Home, Services, Individual Income Tax, Business Tax, Real Property, Recorder of Deeds, Forms, Customer Survey, and About. Below this is a 'Home' section with a banner image and a red bar stating: 'MyTax.DC.gov is a tax portal that makes viewing and paying Individual Income and Business taxes in the District of Columbia - Simpler. Faster. Safer.' Below the banner are three buttons: 'View FAQs', 'Register a New Business: Form FR-500', and 'Where's My Refund?'. The main content area is divided into three columns. The left column is titled 'Log In / Sign-up' and contains a red box with the number 1, a 'Username' input field, a 'Password' input field, a 'Log In' button, and links for 'Forgot Password?' and 'Forgot Username?'. Below these is a 'Sign-up to use MyTax.DC.gov' button. The middle column is titled 'Businesses' and contains links for 'Current & Prior Year Tax Forms', 'Modernized e-File', 'Retrieve a Saved Submission', 'Register a Special Event - Form FR-500B', 'Request Government Exemption', and 'Exemption/Certificate Search'. The right column is titled 'Businesses - File and Pay Now' and contains links for 'FR-120: Corporation Franchise Tax Extension', 'FR-130: Unincorporated Franchise Tax Extension', and 'FR-165: Partnership Tax Extension'. Below the 'Businesses' column is a section for 'Individuals' with links for 'Current & Prior Year Tax Forms', 'DC Free File / DC Fillable Forms', 'Verify My Return', and 'Request Residential Parking Exemption'. To the right of the 'Individuals' section is a section for 'Individuals - File and Pay Now' with links for 'FR-127: Individual Income Tax Extension', 'FR-127F: Fiduciary Income Tax Extension', and 'D-77: Estate Tax Extension'. At the bottom, there are two sections: 'Quick Links' with links for 'What can I do in MyTax.DC.gov?', 'Why sign-up for MyTax.DC.gov?', 'View Tutorials', 'Take me to eTSC', and 'Contact Us'; and 'Quick Payments' with links for 'Pay with eCheck' and 'Pay with Credit / Debit Card', each with a brief description of the payment method.

1. From the [MyTax.DC.gov](https://mytax.dc.gov) homepage, log in using your **Username** and **Password**.

Home

Welcome, John Taxpayer

Log Off

Home

Logon

Settings

Alerts

2

I Want To

More...

bsndemo2

John Taxpayer

john.taxpayer@dc.gov

+1 (202) 555-5555

Last logged on 30-Oct-2017

Balance: \$0.00

There are 4 unread messages

Add your NAICS Code

View My Web Profile

Register a New Tax Account

Send OTR a message

Manage payments and returns

View FAQ's

Accounts

Submissions

Correspondence

Names and Addresses

Logons

Exemptions

Accounts

More...

Filter

Fiduciary Tax

150-001279036


COTHRAN GENERAL CONTRACTORS


\$0.00


Register a New Tax Account

2. To the right of the **I WANT TO** header, click **More**.

2 | Page


I Want To

Welcome, Bob Taxpayer

Log Off


Home > I Want To

I Want To

[View My Web Profile](#)

[Register a New Tax Account](#)

[Send OTR a message](#)

[Manage payments and returns](#)

[View FAQ's](#)

[Go Paperless](#)

Payment Agreement

[Request Payment Agreement](#)

[Update Payment Agreement Bank](#)

Other Activities

[Update NAICS Code](#)

[Request Third Party Access](#)


[Submit QHTC Certification](#)


[Manage a Special Event](#)

[Add/Update Officer](#)

[Add/Update Contact](#)

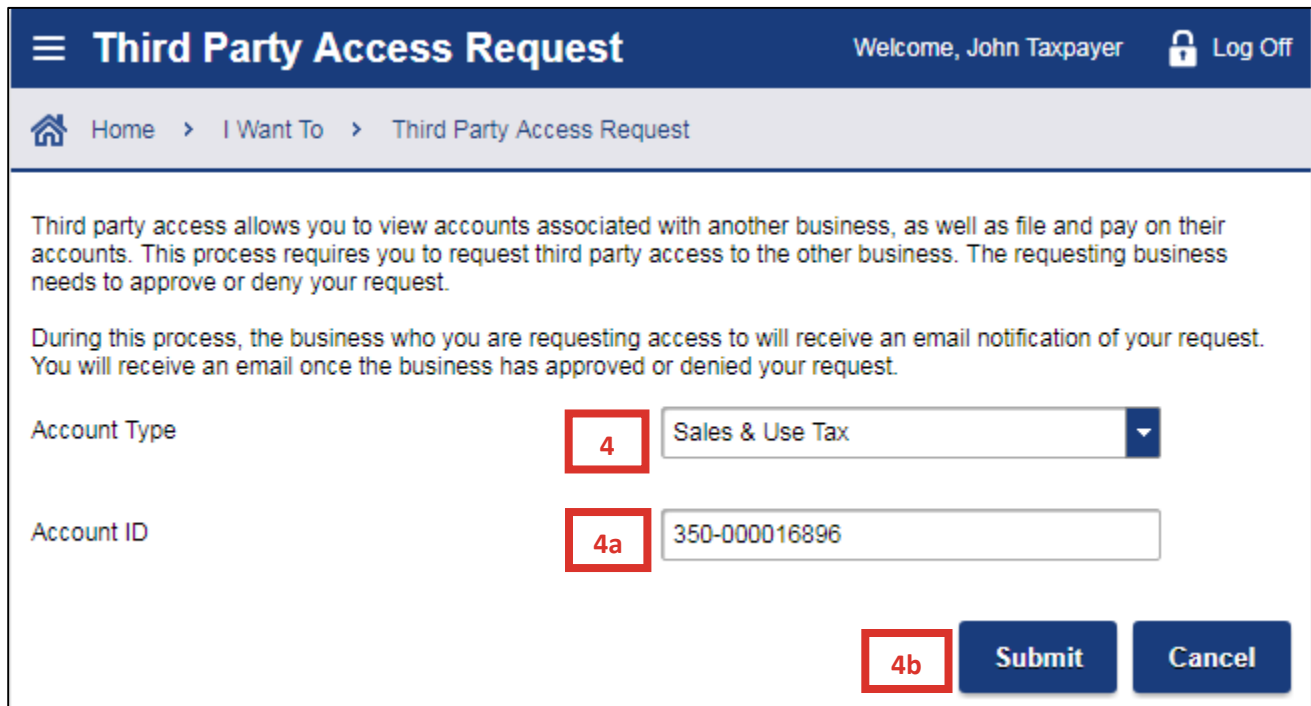
Bulk Processing


[Request Access to Bulk Filing](#)


[Submit W2/1099](#)

3

3. In the **I Want To** section under the **Other Activities** header, click **Request Third Party Access**.



Third Party Access Request Welcome, John Taxpayer Log Off

Home > I Want To > Third Party Access Request

Third party access allows you to view accounts associated with another business, as well as file and pay on their accounts. This process requires you to request third party access to the other business. The requesting business needs to approve or deny your request.

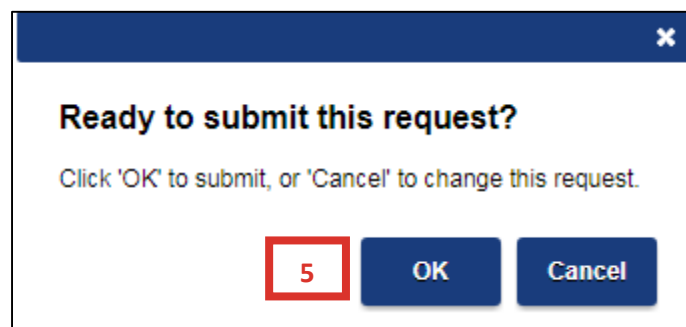
During this process, the business who you are requesting access to will receive an email notification of your request. You will receive an email once the business has approved or denied your request.

Account Type **4** Sales & Use Tax

Account ID **4a** 350-000016896

4b Submit Cancel

4. On the **Third Party Access Request** page, use the drop-down menu to select the **Account Type** (e.g. Sales & Use Tax, Withholding Wage Tax) that you would like to gain access to. **Note:** You need to know what type of account the taxpayer signed up with via [MyTax.DC.gov](https://mytax.dc.gov) in order to make a proper selection.
 - a. In the **Account ID** field, enter the **Account ID** associated with the **Account Type**. **Note:** Based on the **Account Type** selected, the system will request an Account ID, FEIN, SSN or ITIN.
 - b. Click **Submit**.



Ready to submit this request?

Click 'OK' to submit, or 'Cancel' to change this request.

5 OK Cancel

5. A **Ready to submit this request?** pop-up, will appear. Click **Ok**.

6. A **Confirmation** page displays. To obtain a printed copy of this page, click **Printable View**. Otherwise, click **OK**.

7. A printable version of the **Confirmation** page displays.

Note: The Taxpayer will receive your third party request via his or her [MyTax.DC.gov](https://mytax.dc.gov) account.

Home

Welcome, John Taxpayer

Log Off

Home

Logon

Settings

Alerts

Balance due: \$13,997.55

There are 5 unread messages

There are 3 unread letters

Add your NAICS Code

I Want To

More...

View My Web Profile

Send OTR a message

View FAQ's

Individuals and Businesses

Accounts

Submissions

Correspondence

Exemptions

8

Individuals and Businesses

00029-31104

\$13,997.55

COTHRAN GENERAL CONTRACTORS

451 BURBANK ST SE

WASHINGTON DC 20001-5710

00000-20172

\$0.00

LIFELIKE TAXIDERM, LLC

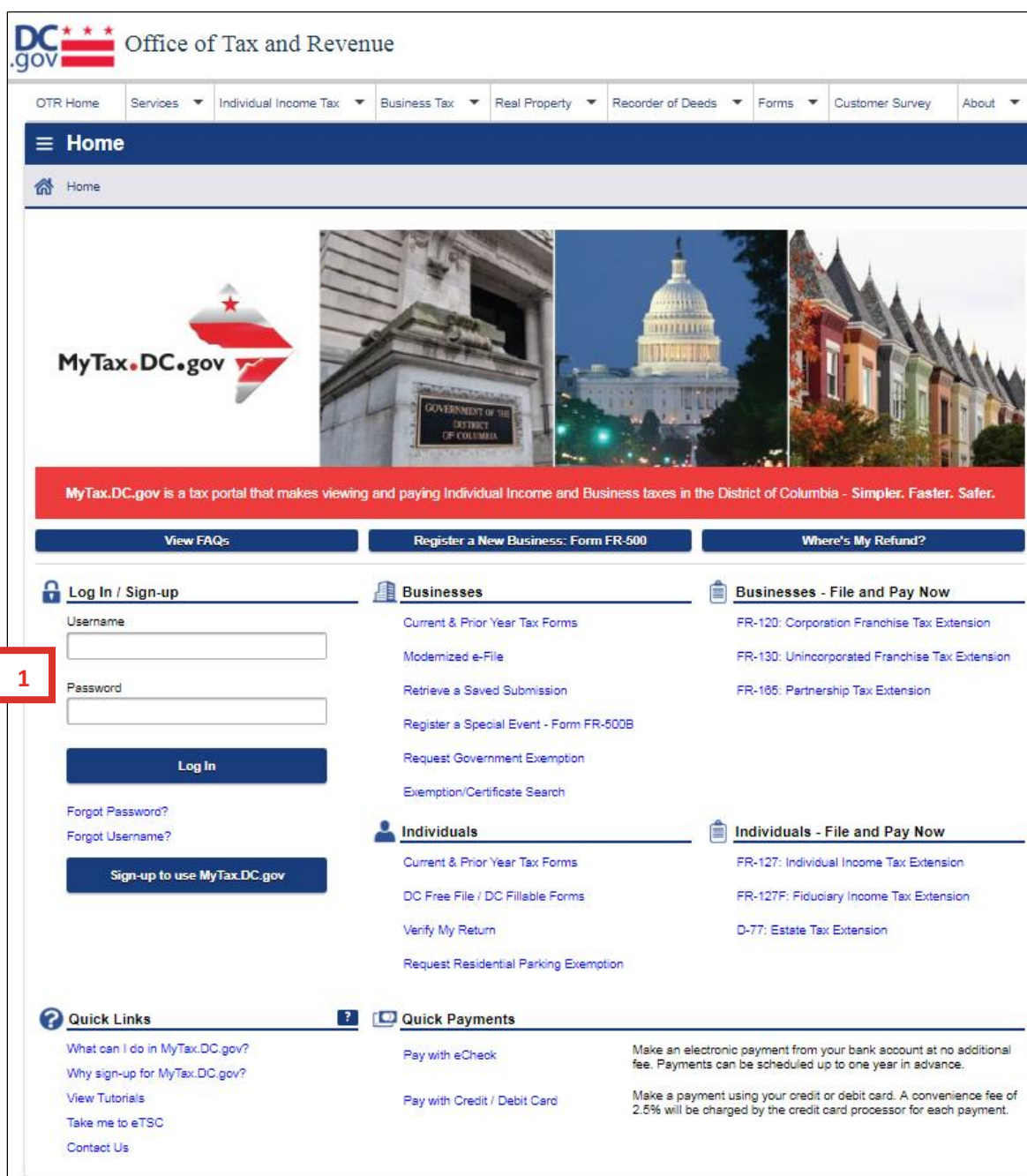
700 7TH ST SW # 344

WASHINGTON DC 20024-2442

Needs attention

- If the taxpayer approves your third party request, when you log into your [MyTax.DC.gov](https://mytax.dc.gov) your profile, you will have access to your accounts and the client's accounts. You will see a list of all accessed accounts under the **Individuals and Businesses** tab.

Approve a Third Party Access Request



DC.gov Office of Tax and Revenue

OTR Home Services Individual Income Tax Business Tax Real Property Recorder of Deeds Forms Customer Survey About

Home

Home

MyTax.DC.gov

MyTax.DC.gov is a tax portal that makes viewing and paying Individual Income and Business taxes in the District of Columbia - **Simpler. Faster. Safer.**

[View FAQs](#) [Register a New Business: Form FR-500](#) [Where's My Refund?](#)

Log In / Sign-up

Username

Password

Log In

[Forgot Password?](#)

[Forgot Username?](#)

Sign-up to use MyTax.DC.gov

Businesses

[Current & Prior Year Tax Forms](#)

[Modernized e-File](#)

[Retrieve a Saved Submission](#)

[Register a Special Event - Form FR-500B](#)

[Request Government Exemption](#)

[Exemption/Certificate Search](#)

Businesses - File and Pay Now

[FR-120: Corporation Franchise Tax Extension](#)

[FR-130: Unincorporated Franchise Tax Extension](#)

[FR-185: Partnership Tax Extension](#)

Individuals

[Current & Prior Year Tax Forms](#)

[DC Free File / DC Fillable Forms](#)

[Verify My Return](#)

[Request Residential Parking Exemption](#)

Individuals - File and Pay Now

[FR-127: Individual Income Tax Extension](#)

[FR-127F: Fiduciary Income Tax Extension](#)

[D-77: Estate Tax Extension](#)

Quick Links

[What can I do in MyTax.DC.gov?](#)

[Why sign-up for MyTax.DC.gov?](#)

[View Tutorials](#)

[Take me to eTSC](#)

[Contact Us](#)

Quick Payments

[Pay with eCheck](#)


Make an electronic payment from your bank account at no additional fee. Payments can be scheduled up to one year in advance.

[Pay with Credit / Debit Card](#)


Make a payment using your credit or debit card. A convenience fee of 2.5% will be charged by the credit card processor for each payment.

1. From the [MyTax.DC.gov](https://mytax.dc.gov) homepage, log in using your **Username** and **Password**.

Home

Welcome, Bob Taxpayer  Log Off

Home



Logon

Setting

2

Alerts

bsndemo3


Bob Taxpayer

bob.taxpayer@dc.gov


+1 (202) 555-5555

Last logged on 30-Oct-2017


Balance: \$4,233.29




Balance due: \$4,233.29




There are 3 unread messages



There are 3 unread letters



Pending Account Access Request



I Want To

More...

View My Web Profile

Register a New Tax Account

Send OTR a message

Manage payments and returns

View FAQ's

Go Paperless

Accounts


Submissions

Correspondence

Names and Addresses

Logons

Exemptions




Accounts

More...

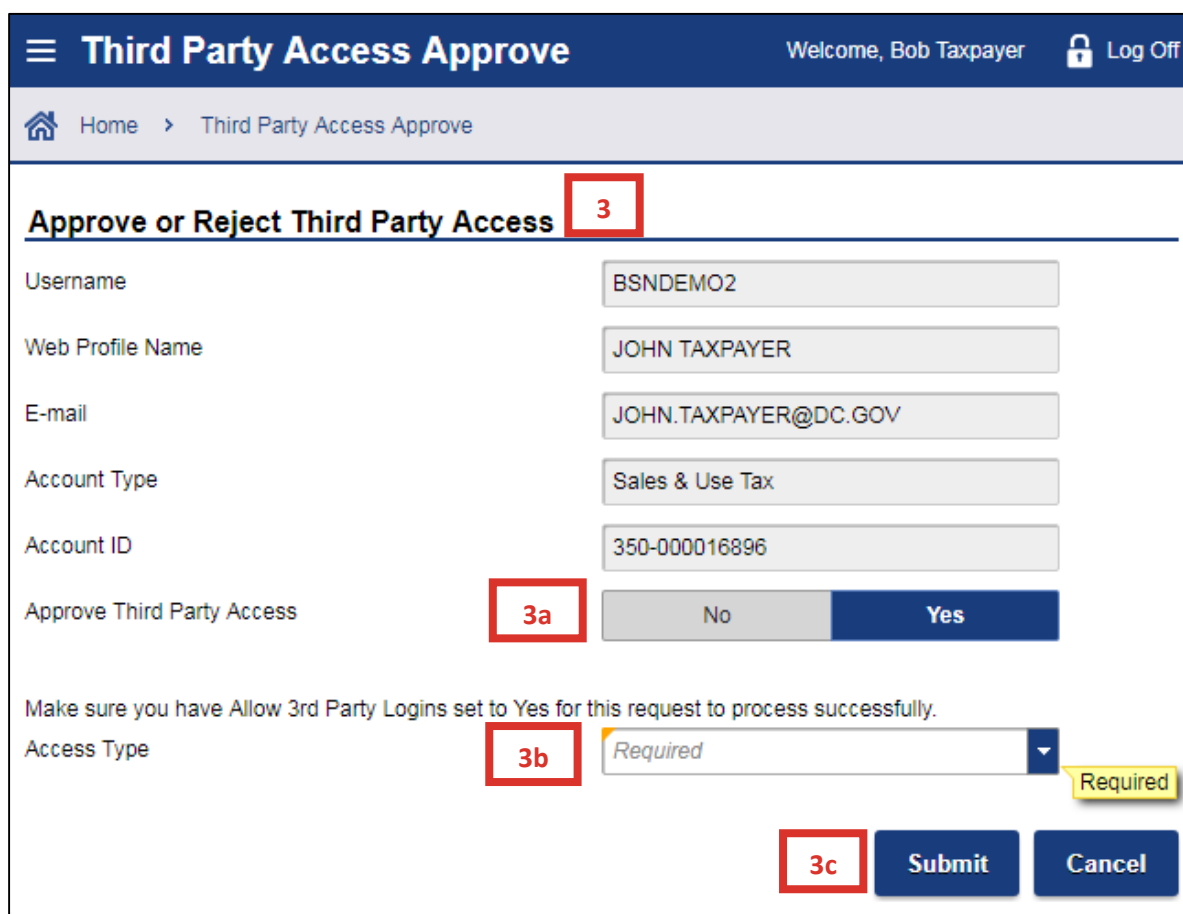
Filter

Sales & Use Tax	350-000016896	LIFELIKE TAXIDERMY, LLC	\$0.00
Unincorp. Business Franchise	260-000015574	LIFELIKE TAXIDERMY, LLC	\$4,233.29

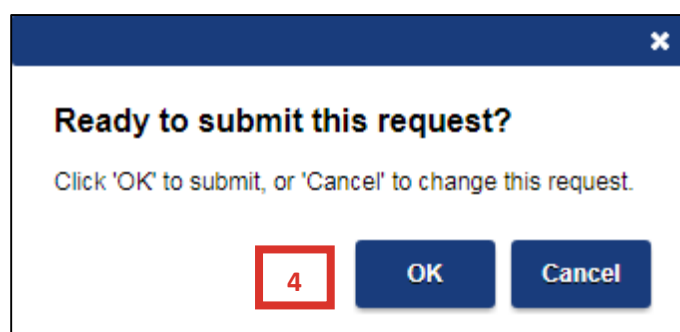


Register a New Tax Account

2. Under the **Alerts** section, click **Pending Account Access Request**.



3. On the **APPROVE OR REJECT THIRD PARTY ACCESS** page, you will see the **Username**, **Web Profile Name**, and **Email** of the person who has requested access to your account. Additionally, you will see the **Account Type** for the request.
 - a. Click **No** or **Yes** to **Approve Third Party Access**.
 - b. Select the third party **Access Type** from the drop menu. You can grant permission to file returns, file returns and make payments, make payments or view.
 - c. Click **Submit**.



4. A **Ready to submit this request?** pop-up, will appear. Click **Ok**.

5. A **Confirmation** page displays. To obtain a printed copy of this page, click **Printable View**. Otherwise, click **OK**.

6. A printable version of the **Confirmation** page displays.